

*BDDS Portal Provider Training 9:*

# *Viewing Transitions*

September 25, 2018



# Transitions

PCISP Profile Case Notes Documents Monitoring Checklist **Transitions**

## Basic Information

**Personal Information**

<b>First Name</b> TOBY	<b>Middle Name</b> <input type="text"/>	<b>Last Name</b> KEITH	
<b>Preferred Name/Nickname</b> <input type="text"/>	<b>RID</b> 100433738099	<b>SSN</b> ***-**-7850 <input type="checkbox"/>	<b>DOB</b> 7/8/1961

Transitions are found by clicking the Transitions link on the individual specific navigation bar.



# Transitions

## *Transitions - Active*

Transition...	Intended...	Actual Tr...	Status	Status Date	# of Open...	Moving Fr...	Moving T...
Change of Ad...	10/01/18		BDDS Approv...	09/25/18	0	2	2

Navigation: 5 items per page, 1 - 1 of 1 items

## *Transitions - Historical*

Transition Type	Actual Transi...	Status	Status Date	Moving From Di...	Moving To District
Change of Address;...	07/03/17	Closed	06/29/17	2	2

Navigation: 5 items per page, 1 - 1 of 1 items

- Active (open) transitions appear in the first grid.
- Historical (closed) transitions appear below.
- Select the transition you wish to view by clicking anywhere on the transition



# Transitions

### Transition Preparation

- Transition Prep
- Transition Plan
- EIC
- Pre-Transition
- Documents
- 7-14 Day Post
- 30 Day Post
- Manage

**\* Type** Community to Supported Living

**\* Intended Transition Date**

**Current Address**

Address Type	Address	City, State Zip	County	District	Effective Date	End Date
Individual Residence	1800 LINCOLN AVE Apt T	EVANSVILLE, IN 47722-1000	Daviess	7	2/9/2018	

**New Address** + Enter New Address

Address Type	Address	City, State Zip	County	District

The Transitions left side navigation menu allows the user to view:

- Transition Plan
- Transition Prep
- Environmental Information Checklist (EIC)
- Pre-Transition Checklist
- 7-14 Day Post Transition Checklist (if in post transition and the Actual Transition Date has been entered.)
- 30 Day Post Transition Checklist (if in post transition and the 7-14 Day checklist has been entered)



# Transitions

Transition Prep



Transition Plan



EIC



Pre-Transition



Documents

7-14 Day Post

30 Day Post

Manage

Documents is a link to the Document Library rather than a page within the Transition.



# Transitions

Transition Prep



Transition Plan



EIC



Pre-Transition



Documents

7-14 Day Post

30 Day Post

Manage

Green checkmarks indicate a section of the Transition is complete.



# Transitions

Transition Plan					
		Person Responsible	Target Due Date	Completion Date	
Transition Prep	✓				
Transition Plan	✓	* Submission of new CCB	Cathy Case-Manager	10/26/2017	10/26/2017
EIC		* Personal inventory	Polly Provider	10/26/2017	10/26/2017
Pre-Transition		* Family/guardian notification/contact information	Polly Provider	10/26/2017	10/26/2017
Documents		* Transfer of Payee	N/A	10/26/2017	10/26/2017
7-14 Day Post		* Income and asset information	Polly Provider	10/26/2017	10/26/2017
30 Day Post		* Day service program information	Polly Provider	10/26/2017	10/26/2017
Manage		* Visits with potential housemates/to new address	Patricia Provider	10/26/2017	10/26/2017

The various sections of the Transition includes questions and responses related to the transition. This information is used by the BDDS District Office to approve, deny, or return the transition for edits.



# Transitions

Transition Plan					
		Person Responsible	Target Due Date	Completion Date	
Transition Prep	✓				
Transition Plan	✓	* Submission of new CCB	Cathy Case-Manager	10/26/2017	10/26/2017
EIC		* Personal inventory	Polly Provider	10/26/2017	10/26/2017
Pre-Transition		* Family/guardian notification/contact information	Polly Provider	10/26/2017	10/26/2017
Documents		* Transfer of Payee	N/A	10/26/2017	10/26/2017
7-14 Day Post		* Income and asset information	Polly Provider	10/26/2017	10/26/2017
30 Day Post		* Day service program information	Polly Provider	10/26/2017	10/26/2017
Manage		* Visits with potential housemates/to new address	Patricia Provider	10/26/2017	10/26/2017

The Transition Plan includes a list of needed items and information, who is responsible for obtaining, and the target and due dates. Providers may be listed here.



# Transitions

## Environmental Inspection Checklist

\* Will the individual be living with family? If so, EIC is not required.

No

General Content

Building Exterior

Building Interior

Kitchen

Bathroom

Bedrooms

Other Rooms & Areas

\* Name of Person Performing Inspection

Cathy Case-Manager

\* Date of Visit for EIC (actual visit to the site)

10/27/2017



\* Environmental Checklist Comments

Except for the broken window, all is ready for move in.

If the Environmental Inspection Checklist is required for the transition type selected, the user will first indicate whether or not the individual will be living with family. If YES is selected from the drop down menu, the EIC is not required and will be removed from the transition.



# Transitions

**Environmental Inspection Checklist**

\* Will the individual be living with family? If so, EIC is not required. No ▼

General Content | Building Exterior | Building Interior | Kitchen | Bathroom | Bedrooms | Other Rooms & Areas

* Does the foundation appear to be free of obvious defects?	Yes ▼	
* Does the exterior of the building appear to be free from major damage?	Yes ▼	
* Do the exterior stairs, rails, and porches appear to be sound and free of hazards?	Yes ▼	
* Are handrails solidly installed wherever there are four or more steps?	No ▼	



Whenever NO is the selected response to many questions, a corrective action plan, or CAP, is required.

Clicking this link allows the CAP to be opened for viewing.



# Transitions

### Corrective Action Plan

**Issue** Answered (No) to Question: Are handrails solidly installed wherever there are four or more steps?

**\* Action Plan** The exterior stairs handrail needs to be tightened. Provider has spoken with landlord and it will be fixed prior to move in.

**\* Responsible Entity** Patricia Provider

**\* Target Date for Completion** 10/27/2017

**Resolution**

**Date Resolved**

Cancel Save

The CAP will include an Action Plan, name the Responsible Entity, and Target Date for completion.

If the CAP has been resolved, that information will appear below.



# Transitions

## Environmental Inspection Checklist

Transition Prep ✓

Transition Plan ✓

EIC ✓

Pre-Transition

Documents

7-14 Day Post

30 Day Post

CAPS

Manage

\* Will the individual be living with family? If so, EIC is not required.

No

General Content

Building Exterior

Building Interior

Kitchen

Bathroom

Bedrooms

Other Rooms & Areas

\* Does the furnace (and air-conditioner, if present) appear to be in good working order? Is the furnace area free of debris?

Yes

\* Is the water heater present and appear to be in good working order?

Yes

\* Is the unit free of any open, exposed or damaged electrical boxes?

Yes

\* Are the halls and stairways well-lighted? Do all stairways have handrails?

Yes

\* Is there more than one way to exit the building?

Yes

\* Are there adequate facilities for the disposal of garbage?

Yes

\* Is there at least one smoke alarm for each floor level?

Yes

\* If heating is by gas, is there a carbon monoxide detector present on the main floor? If not heated by gas, response is YES.

Yes

Because this example includes a CAP, a CAP field is now displayed on the left navigation menu.



# Transitions

## Corrective Action Plans

- Transition Prep ✓
- Transition Plan ✓
- EIC ✓

### Open CAPs

Issue	Target Date	Action Plan	Responsible Entity
Answered (No) to Question: Are handrails solidly i...	10/27/2017	The exterior stairs handrail needs to be tightened....	Patricia Provider

The CAPs page displays the issue, target date for completion, action plan, and responsible entity. CAPs may be viewed from this page by clicking anywhere on the CAP.



# Transitions – Manage / Status

Status Log		
Status Date	Status	Comment
2/22/2018	BDDS Approved, Needing Actual Transition Date	
2/22/2018	BDDS Provisional Approval	Provisional approval for move once CAPs are resolved.
2/22/2018	Submitted to BDDS	
2/22/2018	Submitted to CM Supervisor	
2/19/2018	Initiated	

## The Manage Page includes:

Date the transition was **Initiated** by the Case Manager

Date the transition was **Submitted to CM Supervisor** for review

Date the transition was **Submitted to BDDS**

Date **Provisional Approval** or **BDDS Approved** status is given



# Transitions



- BDDS may provisionally approve a transition based on the CAP and information provided.
- **Provisional Approval does not authorize the move of an individual.**

# Transitions



- All CAPs **must be resolved** before the individual moves.
- **A move is authorized only when the transition status is BDDS APPROVED.**

# Transitions

## Enter Actual Transition Date

Enter Actual Transition Date

11/01/2017 

Note: The 7-14 day Post Transition checklist is available for entry 7 days after the actual transition date.

Once BDDS has approved the transition and the individual moves, the Case Manager will enter the Actual Transition Date.



# Transitions

Status
Post-Transition, Needs 7-14 Day Checklist
BDDS Approved, Needing Actual Transition Date
BDDS Provisional Approval
Submitted to BDDS
Submitted to CM Supervisor
Initiated

- 7 days following this date, the first post transition checklist becomes available.
- 30 days following this date, the second post transition checklist becomes available.



# Transitions

Status
Post-Transition, CAP Issues
Post-Transition, Needs 30-Day Checklist
Post-Transition, Needs 7-14 Day Checklist
BDDS Approved, Needing Actual Transition Date
BDDS Provisional Approval
Submitted to BDDS
Submitted to CM Supervisor
Initiated

If, after 60 days, CAPs created post transition have not been resolved, the transition is referred to BQIS.



# Transitions

Status
Closed
Post-Transition, CAP Issues
Post-Transition, Needs 30-Day Checklist
Post-Transition, Needs 7-14 Day Checklist
BDDS Approved, Needing Actual Transition Date
BDDS Provisional Approval
Submitted to BDDS
Submitted to CM Supervisor
Initiated

Once the last post-transition activity required is completed, the status of the transition automatically moves to Closed.



# Emergency Transitions

An Emergency Transition can be created when the individual needs to move suddenly. If the individual does not return to their previous home within 5 days, the Portal will create a System Initiated Transition that must be completed. System Initiated Transitions are full transitions that require information and documentation based on the transition type.



# BDDS Portal Trainings

<https://www.in.gov/fssa/ddrs/5437.htm>

- BDDS Portal Provider Training 1: Accessing the BDDS Portal
- BDDS Portal Provider Training 2: User Management (for System Administrators)
- BDDS Portal Provider Training 3: My Cases / Caseload Assignment
- BDDS Portal Provider Training 4: Navigating the Portal
- BDDS Portal Provider Training 5: Individual Profile
- BDDS Portal Provider Training 6: Document Library
- BDDS Portal Provider Training 7: PCISP
- BDDS Portal Provider Training 8: Viewing the Monitoring Checklist
- BDDS Portal Provider Training 9: Viewing Transitions

